

**Customer Relationship Management**  
**Florida Gulf Coast University**  
**Lutgert College of Business – Department of Marketing**  
**MAR 4860-12802**  
**Spring - 2020**

**Instructor:** Dr. Brent L. Baker  
**Office:** 3337 Lutgert Hall **Office Phone:** (239) 745-4348  
**E-mail:** bbaker@fgcu.edu  
**Class Times:** 4:30 – 7:15 pm Wednesday  
**Class Room:** Lutgert Hall 1202  
**Office Hours:** Monday: 12:30-3:00 pm  
Tuesday: 5:00 – 7:30 pm

**COURSE PREREQUISITES**

[MAR 3023](#) with a minimum grade of “C”.

**TEXTBOOK**

*No Required Text*

**SUPPLEMENTAL MATERIALS**

Additional course materials available through course’s FGCU Canvas website.

**COURSE DESCRIPTION**

This course provides the student with the basic knowledge and skill sets required to effectively build and use a CRM system. This includes examining such critical issues as: selecting the proper information to collect, choosing a platform, integrating the system with all marketing activities and using the information collected to improve both the customer’s relationship and the firm’s marketing efforts. For the purposes of this course, we will be using the Salesforce platform and the associated Trailhead system.

**COURSE OBJECTIVES**

The course uses a hands-on philosophy that incorporates lectures, case studies, exercises and student-led projects. The goal is to ensure students both understand the mechanics of CRM and develop a system that provides actionable information to the management team. The course is also designed to provide students with practical knowledge valuable to potential employers, specifically how to use Salesforce. During the term you will study a variety of Salesforce modules and will be provided with a certificate documenting your efforts.

**COURSE FORMAT**

Classes will utilize a variety of pedagogical techniques to foster a useful learning environment. Class time will be dedicated to lecture and discussion with a heavy emphasis on discussion. Other pedagogical techniques which may be used during class include role plays, videos, group activities as well as other methods of instruction. This class works best when the students are as relaxed as possible. I have found that a students’ willingness to contribute to the conversation with insightful questions, comments and respectful debate are the best way to get students to relax and foster the most productive conversations.

## COURSE EVALUATION

Your grade is determined from the accumulation of points acquired from the following evaluative criteria.

Group Project	100
Reflection Papers 2 @ 25 each	50
Article Presentation	25
Salesforce Trailheads	25
TOTAL	200

Each of these elements is explained in more detail in this syllabus as well as specific instructions to be distributed during the semester. **If you do not understand what is required, it is your responsibility to remedy the situation through an appointment with the instructor.** Class time will be devoted to discussions of the critical topics

Total Points	Grade
180-200	A
160-179	B
140-159	C
120-139	D
Below 120	F

## COURSE COMPONENTS

### ***Group Project 100 Points***

The group will be focused on designing a CRM system from the ground up. This system will be built in Microsoft Excel. The purpose of this assignment is to provide students with the kind of insight needed to understand and utilize a CRM system in a way that allows the selling organization to better track and enhance long term B2B relationships between buying and selling firms.

### ***Reflection Paper 50 Points (2 @ 25 each)***

Students will need to complete two reflection papers dealing with current issues or topics surrounding customer relationship management as a strategy and CRM software.

### ***Article Presentation 25 Points***

Each of you will pick a CRM related article from the industry literature to teach the class. The purpose is twofold. The first goal is to give you additional practice at delivering presentations. The second goal is to increase your familiarity with CRM terminology. It is important to be aware of “the state of the market” in CRM topics. Go to the library or make use of their website and pick an article (2-3 pages long) that deals with topics from the text

***No notes are allowed but you will be permitted one overhead/PowerPoint. In addition, you will need to turn in a one to two page, double spaced summary of your article with a copy of your article. Failure to turn in this written portion will result in a zero for the assignment.***

Instruction that is more specific will be given during class.

### ***CRM Exercises/Salesforce Trailhead (5 @ 10 points each; 50 points total)***

The purpose of this assignment is to expose the students to CRM technology in a way that provides familiarity and the ability to discuss CRM software with potential employers. Similar to the role-play exercises this is both a quantity and quality based assignment. There are several beginner 'sales cloud' trails offered by Salesforce.com. You will be awarded 10 points for each trail you complete. Further, more specific directions to follow.

### ***Behavior***

It is important to not engage in behaviors that can take the attention of those in the class away from the task at hand. These types of behaviors are strongly discouraged. Specifically, if a student ever engages in any of the following during instruction or while class is being conducted, they will receive an automatic 10% deduction from their final grade for each offense.

- use of smart/cell phone for any reason
- using laptop computers (or any other digital device)
- doing work for another class
- passing notes to other students in class
- excessive conversation not related to the classroom discussion (further explanation will be provided)
- reading the newspaper
- falling asleep (purposefully)

There will be no warnings as it pertains to inappropriate classroom behavior. **There will be no exception as to the application or enforcement of these rules. If the instructor sees, you engaged in any of the inappropriate behaviors listed above you will automatically receive a one letter grade deduction off your final grade, per incident, regardless of how well you've been performing in the class.**

Please be advised that the above list is advisory and not meant as a complete list of all activities or behaviors that students may engage in that warrant a full letter grade deduction. If a student ever engages in any behavior that is so distracting to the class and facilitation of the course that they are asked to leave, they too will automatically receive a full letter grade deduction on their final grade for each time they were excused from class. The instructor also reserves the right to levy this penalty on any student who engages in any other behavior, not listed above, deemed severely offensive, distracting or in any other way inappropriate for the college classroom. The 'average person' criteria will be used to determine the severity of student behavior.

***Attendance Policy*** – *Students who miss more than two scheduled classes will automatically forfeit 10 pts. toward their final grade. Students who miss more than four classes will automatically forfeit 25 pts. toward their final grade. Students who miss more than six classes will forfeit 50 pts. toward their final grade.*

There are only two exceptions to this policy. The first are students who miss class due to FGCU sponsored events. For example, students involved in FGCU sponsored clubs who miss class for a conference, or athletes missing class due to an athletic. However, if you are going to miss class due to a FGCU sponsored event it is your responsibility to inform the instructor **PRIOR** to missing class; else your absence will not be excused. The second excuse is related to religious observations and may be excused (see note below). Other extreme cases will be considered on a case-by-case basis provided the student is pro-active in their efforts toward informing the professor/graduate assistant of the issue. One of the criteria used to determine the validity of such cases will be whether or not the student could reasonably expect the need to miss class prior to the start of the semester. Thus, things such as family vacations and recurring physical therapy needed because of a previous injury would not be excused.

Extended disability/rehabilitation due to a serious injury suffered during the semester may be an exempt absence depending on the circumstance. The professor will determine whether an absence meets the 'extreme case' category as well as reserving the right to demand documentation verifying the reason for the absence. *Please keep in mind that nurse practitioners, physician's assistant and even medical doctors do not have the authority to excuse your absence. Doctor's notes will only be accepted when the professor asks for them in an effort to validate claims of an extreme case claimed by a student seeking an exception to the attendance rule. Please keep in mind that extreme cases are not issues experienced by the bulk of society from time-to-time such as the flu. Extreme means something very dramatic and unforeseen.*

Attendance will be recorded with an attendance sheet that will be sent through the class during class time. Anyone caught signing the attendance record for another person in the class will be subject to failure and expulsion from the course. Please see the university academic honesty policy below for further detail. **It is your responsibility to make sure you put your name on the attendance sheet, failure to do so means you will be counted absent, even if you were there.**

### ***Religious Holidays***

*Students who anticipate the necessity for being absent from class due to the observation of a major religious observance must provide notice of the date(s) to the instructor, in writing, by the second class meeting.*

**Late Work: Written work is due at the beginning of class the day the assignment is due.** Late work will be accepted on a declining schedule of value. Specifically, anything submitted within the first 24 hours after the due date will be eligible for no more than 75% of the assignments full value. Anything submitted between 24 and 48 hours will be eligible for no more than 50% of the paper's full value. Anything submitted between 48 and 72 hours of the due date will be eligible for no more than 25% of paper's full value. Anything submitted after 72 hours of the paper's due date will not be eligible for credit. In the event of extreme or dire circumstances, such as the death of a family member, leniency toward this policy may be given. As with the need for a makeup exam or in class assignment I reserve the right to first approve and then verify any proffered excuse. ***Such dire circumstances must be made known to the instructor prior to the due date of the written assignment.***

### **Academic Behavior Standards and Academic Dishonesty**

All students are expected to demonstrate honesty in their academic pursuits. The university policies regarding issues of honesty can be found in the FGCU Student Guidebook under **the Student Code of Conduct and Policies and Procedures** sections. All students are expected to study this document which outlines their responsibilities and consequences for violations of the policy. The FGCU Student Guidebook is available online at <http://studentservices.fgcu.edu/judicialaffairs/new.html>

### **University Nondiscrimination Statement**

Florida Gulf Coast University is committed to ensuring equity and fairness for all University employees, students, visitors, vendors, contractors and other third parties. As such, the University prohibits discrimination on the bases of race, color, national origin, ethnicity, religion, age, disability, sex (including sexual harassment/assault), gender identity/expression, marital status, sexual orientation, veteran status or genetic predisposition with regard to admissions, employment, programs or other activities operated by the University. This prohibition extends to enforcement of **Title IX** of the Education Amendments of 1972. Questions or complaints should be directed to the Office of Institutional Equity and Compliance (OIEC). The OIEC's phone number is (239)745-4366; the OIEC email address is [OIEC@fgcu.edu](mailto:OIEC@fgcu.edu).

### **Disability Accommodations Services**

Florida Gulf Coast University, in accordance with the Americans with Disabilities Act and the university's guiding principles, will provide classroom and academic accommodations to students with documented disabilities. If you need to request an accommodation in this class due to a disability, or you suspect that your academic performance is affected by a disability, please see me or contact the Office of Adaptive Services. The Office of Adaptive Services is located in the Wellness Building. The phone number is 239-590-7956 or Video Phone (VP) 239-243-9453. In addition to classroom and campus accommodations, individuals with disabilities are encouraged to create their personal emergency evacuation plan and FGCU is committed to providing information on emergency notification procedures. You can find information on the emergency exits and Areas of Rescue Assistance for each building, as well as other emergency preparedness materials on the Environmental Health and Safety and University Police Department websites. If you will need assistance in the event of an emergency due to a disability, please contact Adaptive Services for available services and information.

### **Student Observance of Religious Holidays**

All students at Florida Gulf Coast University have a right to expect that the University will reasonably accommodate their religious observances, practices, and beliefs. Students, upon prior notification to their instructors, shall be excused from class or other scheduled academic activity to observe a religious holy day of their faith. Students shall be permitted a reasonable amount of time to make up the material or activities covered in their absence. Students shall not be penalized due to absence from class or other scheduled academic activity because of religious observances. Where practicable, major examinations, major assignments, and University ceremonies will not be scheduled on a major religious holy day. A student who is to be excused from class for a religious observance is not required to provide a second party certification of the reason for the absence.

### **Resources for Faculty General Education**

Information on General Education program requirements is available online at [http://www.fgcu.edu/General\\_Education/index.html](http://www.fgcu.edu/General_Education/index.html)

### **Service-Learning**

Information on integrating service-learning into the course and course syllabus is available online at <http://www.fgcu.edu/Connect/>

### **Distance-Learning**

Information on distance learning courses is available online at <http://itech.fgcu.edu/distance/>

### **Online Tutorials**

Information on online tutorials to assist students is available online at <http://www.fgcu.edu/support/Approved>

### **Canvas Learning Management System and Demonstration Site**

Information on Canvas is available online at <http://canvas.fgcu.edu/> and <https://fgcu.instructure.com/courses/7692>

## **Library Resources**

Main page: <http://library.fgcu.edu/>

Tutorials & Handouts:

<http://library.fgcu.edu/RSD/Instruction/tutorials.htm> Research Guides:

<http://fgcu.libguides.com/>

Faculty Support: [http://library.fgcu.edu/faculty\\_index.html](http://library.fgcu.edu/faculty_index.html)

Contact Us: <http://library.fgcu.edu/LBS/about/contactus.htm>

## **Respondus Monitor – Remote, Online Exam Monitoring**

In order to protect the integrity of online assessments that are delivered to students off site in a non- proctored location, this course may employ *Respondus Monitor* technology that will allow for the web- enabled monitoring of exams and quizzes. Students must own a computer device and an associated webcam that meet the minimum requirements of the University’s standard remote monitoring system. Additional information:

- *Respondus Monitor* overview: <http://respondus.com/products/monitor/>
- *Respondus Monitor* Faculty Training and Workshops: TBA

## **Respondus LockDown Browser – Classroom and/or Remote Online Exams**

In order to protect the integrity of classroom *or* remote online exams, this course may employ *Respondus LockDown Browser* technology that will allow for the student’s temporary restriction to a designated online testing website, disabling the ability to print, copy, access other applications or move to any other URL for the duration of the assessment. This technology may be used on campus in University computer classrooms *or* for remote delivery of quizzes and exams. [For online classes only: students must own a computer that meets the minimum requirements of the University’s standard lock down browser application.]

Additional information:

- *Respondus LockDown Browser* overview: <http://respondus.com/products/lockdown-browser/>
- *Respondus LockDown Browser* Faculty Training and Workshops: TBA

## **Lecture Capture Technology/FGCU Capture – Classroom Recording**

This course may employ technology that will allow for audio and/or video recording of live classroom sessions. This lecture capture technology is utilized for the sole purpose of enhancing student learning. It may provide for supplemental student instruction via secure links to recorded session(s,) the live stream of courses, presentations of off-site guest speakers and/or the delivery of course instruction utilizing “flipped classroom” methodologies. Student questions and/or comments may be included as a part of any session being recorded. See FGCU-CAPTURE for additional details and training <http://aets.fgcu.edu/fgcucapture.asp>

**Warning:** *All statements in this syllabus are tentative and subject to change. The student is responsible for staying informed of all changes.*

**(Tentative) Schedule**

Meeting	Dates	Tasks
	<b>January</b>	
1	6	USASBE Conference in New Orleans – No Class
2	13	Syllabus Q & A and History of CRM <i>Article Presentation 1-5</i>
	20	<i>MLK Holiday – No Class</i>
3	27	Organization and CRM <i>Article Presentation 6-10</i>
	<b>February</b>	
4	3	CRM and Data Management
5	10	B2B CRM <i>Article Presentation 11-15</i>
6	17	CRM Program Measurement Tools <i>Reflection Paper 1</i>
7	24	Social Networking and CRM <i>Article Presentation 16-20</i>
	<b>March</b>	
8	2	<i>Spring Break – No Class</i>
9	9	Database and Customer Data Development <i>Article Presentation 21-25</i>
10	16	CRM Trends, Challenges and Opportunities
11	23	CRM Strategy <i>Article Presentation 26-30</i>
13	30	CRM Value Chain
	<b>April</b>	
14	6	CRM and Ethical Considerations <i>Article Presentations 31-33</i>
15	13	Technology and Data Platforms
15	20	<i>Make Up Overflow Day</i>
16	27	Presentations – <i>Salesforce Trailhead Assignment Due</i>
	<b>May</b>	
18	1	<b>3:00 – 5:15</b> Presentations – <i>Reflection Paper 2</i>

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